

# How to Check in with a Staff Member About Their Well-Being

Published – July 2020

## Overview

This tool will help identify staff who may be experiencing emotional stress and prepare leaders to conduct a well-being check-in. This check-in is not aimed at solving the staff member's emotional stress in the moment, but rather is to address concerning behaviors, and ensure the staff member has the right support, connecting them to existing resources within the organization.

## Time required

- 10 minutes to identify staff member and customize scripting
- 30 minutes to meet with the staff member
- 10 minutes to complete follow-up items from the check-in

## How to use this tool

- 1. Write down why a staff member may need a check-in.**  
Review the list of behaviors and mood changes on page 2 to check if a staff member might be experiencing emotional stress.
- 2. Identify support services available to the staff.**  
Add any emotional support services available at your organization to the list on page 3. You will use this list during the check-in.
- 3. Prepare your talking points for the check-in.**  
Customize the scripting on page 4 to your own voice. You can download an editable version of the suggested scripting [here](#).
- 4. Ready yourself and conduct the check-in.**  
Schedule a 30-minute meeting with the staff member. Use the tips on page 5 to ensure you bring your most empathetic self to the check-in. This will support a productive discussion. Be sure to follow up on any next steps in a timely manner.

# Step 1: Write down why a staff member may need a check-in

The list below outlines common changes in behavior or mood when someone experiences emotional stress. Any staff member who exhibits two or more of the following behaviors is a good candidate for a well-being check-in. If you are concerned about a staff member who doesn't fit the criteria below, write down the reasons why.

For example: You're worried about a staff member who is exhausted due to overtime hours or has recently lost a loved one. Consider checking in with them anyway. When in doubt, trust your instincts here. When conducted appropriately, a well-being check-in rarely worsens the situation. If you would like a printed copy of this page to write on, download and print a copy [here](#).

## Behavioral changes

- Increased irritability, outbursts, or mood swings
- Excessive social withdrawal, avoiding interactions with patients and colleagues when possible
- Acting callous toward patients and family members
- Showing signs of mental or physical breakdown during crisis periods
- Exaggerated responses to being startled by touch or noise
- Loss of interest in activities they previously enjoyed
- Difficulty remembering facts, events, or conversations in recent past
- Signs of increased use of tobacco, alcohol, or other substances
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## Physical changes

- Increase in fatigue and/or reliance on caffeine
- Complaints of frequent headaches or stomachaches
- Changes in eating habits and appetite (for example: skipping meals, eating less)
- Changes in physical appearance (for example: dark circles under the eyes, rapid changes in weight, poor hygiene, changes in attire)
- \_\_\_\_\_

## Performance changes

- More frequent absenteeism or tardiness
- Drop in performance
  - Repeatedly fails to fulfill clinical responsibilities
  - Struggles to make decisions
  - Has become more disorganized than usual
- Decrease in productivity or motivation
- Impaired ability to focus or concentrate
- \_\_\_\_\_

Sources: "Workplace Mental Health: Posttraumatic Stress Disorder," American Psychiatric Association, <http://workplacementalhealth.org/Mental-Health-Topics/Posttraumatic-Stress-Disorder>; Mistry U., "How Can You Spot the Signs of an Employee Experiencing Poor Mental Health?" Undercover Recruiter, <https://theundercoverrecruiter.com/signs-of-mental-health/>

## Step 2: Identify support services available to staff

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At the end of the well-being check-in, you should prepare to brainstorm action steps with your staff members. Below is a starter list of emotionally reaffirming next steps. We recommend tailoring this list and adding any emotional support resources or programs offered by your organization. You can download an editable version of this list [here](#).

### Starter list

- Employee assistance programs, hotlines, and support groups
- Stop doing something non-urgent that's taking time and energy away from more important work
- Focus on just 1-3 important tasks that can be accomplished before the end of the day/shift
- Take a break now to address physical needs for food, water, or rest
- Get support from a trusted colleague, counselor, or HR
- Pass important information or lessons learned to team members who will benefit
- Support another colleague or team member to accomplish something mission-critical
- Take time to communicate gratitude or appreciation to members of your team (for example: send a thank-you email to your staff)
- For teleworking staff, schedule time to collaborate with a colleague on a shared project via phone or videoconference
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## Step 3: Prepare your talking points for the check-in

Review the framework below to help plan your conversation. We recommend writing your own script or outline before the discussion. Keep three principles in mind when drafting a script: be affirming, kind, and empathetic. If helpful, download an editable version of this framework [here](#).

Step	Goal of the step	Example scripting
<b>Open with empathy</b>	Share a specific example of why this staff member is important to you and your team.	<i>I value your humor and how you bring that to our team meetings.</i>
<b>Pinpoint specific observations</b>	Explain why you are having a conversation, and list out specific examples from step 1. Strive for an empathetic, non-judgmental tone.	<i>I know this is a difficult time. I have recently noticed you have been coming in late to work. This is unusual for you, so I wanted to check in to see how you're doing.</i>
<b>Ask open-ended questions</b>	<p>If their initial response is brief or noncommittal, ask a follow-up question, or wait silently for a few moments to see if they elaborate. Let your staff member talk without interruption until they naturally stop or start to repeat themselves.</p> <p>If you sense they are distressed or do not want to engage in the conversation, find another time to talk.</p>	<p><i>What makes you feel this way?</i></p> <p><i>Are there stressors outside of work that you would like to talk about?</i></p> <p><i>I care about your well-being, but if you want to postpone this discussion to next week, that's okay.</i></p>
<b>Look forward</b>	Acknowledge that while you can't solve their emotional stress, you are there to listen and help them identify action steps. If needed, use the list of potential action steps from step 2 to brainstorm next steps together with the staff member.	<p><i>I know we cannot change or solve everything. And you and your other staff members are in a uniquely difficult position. I want to acknowledge all of this to say—sometimes certain events are out of our control.</i></p> <p><i>However, on the things we can change, or can control, let's think on what we can do to make life a little easier for you during this time.</i></p>
<b>Leave the door open</b>	<p>Let your staff member know your door is open to speak with them.</p> <p>Consider scheduling a follow-up conversation in two weeks.</p>	<p><i>Thank you for being vulnerable and so open with me in sharing how you feel. My door is always open. I want you to know that I care about you and value you – both at work and outside of work.</i></p> <p><i>Would it be helpful for us to have this conversation again?</i></p>

# Step 4: Ready yourself and conduct the check-in

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Once you have prepared your scripting, there are three important elements to keep in mind for a well-being check-in: create a safe space, use active listening, and prepare for a variety of responses. The following tips will help you do that.

## 1. Set the tone so staff can speak openly.

Schedule a 30-minute check-in so you won't feel rushed. Be sure to conduct the check-in in a private space. When approaching your staff member, make it clear that this is a check-in on their emotional well-being, not their performance. You may cite performance issues as a reason why you are concerned—but clarify that the goal of the conversation is to discuss any emotional stress they are feeling, not to improve their performance.

## 2. Listen more and talk less.

It can be tempting to jump to a solution at first, but the point of meeting is to hear them out. To help you do this, we recommend adapting an active listening approach. Active listening is a way of communicating that helps individuals feel heard and understood. It also helps you gain insight into the staff member's situation and perspective. Review the key components of active listening listed below.

### Key components of active listening

- **Give your undivided attention**
  - Close your email and minimize other distractions
  - Avoid forming your response while the other person is talking
- **Show you're engaged**
  - Reflect this with your body language and eye contact
  - Nod occasionally
  - Encourage the speaker to continue with small verbal comments like “yes” or “mmhmm”
- **Reflect back, ask questions**
  - Embrace silence
  - Summarize comments
  - Paraphrase and say: “What I'm hearing is...”
  - Ask questions to clarify certain points, such as: “What do you mean when you say...”

### 3. Prepare for a variety of emotional responses.

Staff members may not respond in the way you expect. Review this table of common responses to difficult conversations and how to address them in the moment.

Common responses	How to address in the moment	Example scripting
<b>Staff member looks visibly upset, such as crying</b>	<p>Sit with the staff member and allow them to process their feelings before moving on. Remember to validate their feelings and avoid phrases like “stop crying.”</p> <p>If you are unable to continue the conversation after 15 minutes, consider scheduling a follow-up check-in. In cases of extreme emotional distress, offer to connect your staff member to a therapist or grief counseling for additional support.</p>	<p><i>Take your time. I'll sit here with you as long as you need.</i></p>
<b>Staff member is defensive or angry</b>	<p>Recognize that this may be a part of the distress they are feeling, and a large reaction may be a result of that.</p> <p>Remember to keep calm and listen. Try to defuse the situation by assuring them your concern for them comes from a place of care for them, and not judgement.</p> <p>If their mood doesn't seem to change, reschedule with them to meet when they are in a calmer frame of mind.</p>	<p><i>I understand that this is bringing up some feelings for you. I want to clarify that my intention was only to check-in out of concern for you.</i></p> <p><i>Let's continue this conversation at a later time.</i></p>
<b>Staff member does not wish to open up</b>	<p>Be comfortable with long pauses. Ask encouraging questions. Share something that is distressing you in your life to disarm them and encourage sharing.</p> <p>Ultimately, if the conversation seems to be going nowhere, you have to respect the staff member's wishes, such as a desire for privacy.</p> <p>If you are concerned about their physical or emotional safety, reach out to HR or your employee assistance program.</p>	<p><i>I know it can be difficult to open up. I just want you to know that you are not alone. I can empathize with how you are feeling.</i></p>

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